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Subject: NAM Spring 2016 Board of Directors Meeting
Location: The Ritz-Carlton, Naples, 280 Vanderbilt Beach Rd, Naples, F.L.
When: 3/1/2016 11:45:00 AM - 1:05:00 PM

EVENT: National Association of Manufacturers Board of Directors Meeting

DATE: March 1, 2016

TIME: 11:45 AM Arrival, Speaking at 12:35 PM

LOCATION: Ritz-Carlton Naples, 280 Vanderbilt Beach Road, Naples, FL 34108

PARKING: Porte-Cochere (Main Entrance). Joe Trauger of the NAM will be greeting the Governor upon arrival.

LOCATION SET-UP: The Vanderbilt Ballroom is on the first floor of the Beach Resort.

ON-SITE LOCATION CONTACT: Joe Trauger, VP of Government Relations at 202-365-7927

SEATED AT TABLE: The Governor will be seated at head table with NAM Board of Directors. She will be introduced and ascend a stage, then speak from stage. Note the introduction will be a video presentation, and the Governor's walk-up music will be Joan Jett.

Seated at table:

1. David Dauch, Chairman and Chief Executive Officer, American Axle & Manufacturing
2. Joe Eddy, President/CEO, Eagle Manufacturing Inc
3. Nikki Haley, Governor, State of South Carolina
4. Tim Keating, Senior Vice President, Government Operations, The Boeing Company
5. Mark Kolkhorst, President, ADM Milling, Archer Daniels Midland Company
6. John Lundgren, Chairman and Chief Executive Officer, Stanley Black & Decker, Inc.
7. Charlie Martin, President, Bommer Industries, Inc.
8. Rick Olson, Guest of Jay Timmons
9. Jay Timmons, President and CEO, National Association of Manufacturers

KEY COMPANY PERSONS: See list of attendees

NOTABLE CONFIRMED ATTENDEES: NAM Board of Directors

GIFT: No

PRESS: No

PUBLIC: Only invited attendees will be present, but the event can be included on the Governor's public schedule.

INTRODUCED BY: Jay Timmons, President and CEO, NAM

LENGTH OF SPEAKING: 10-15 minutes of remarks, 10 minute Q & A

LINE-BY-LINE:

- 11:45 a.m. Nikki Haley (NH) arrives.
- NH will be dropped off at the main entrance of The Ritz-Carlton Beach Resort.
 - NH will be greeted by Joe Trauger of the NAM.
 - NH will be escorted by Joe Trauger to the Ritz-Carlton Ballroom.
- 11:45 p.m. Time in Green room to microphone NH.
- 12:15 p.m. NH is seated at head table
- 12:30 p.m. Video and introduction by Jay Timmons
- 12:35 p.m. NH delivers remarks
- 12:50 p.m. Q&A with audience
- 1:00 p.m. (approx.) Wrap up
- 1:05 p.m. End of this session.
- NH will exit the stage.
- 1:05 p.m. NH departs.

ATTENDEES: Ashton has a printout list of all attendees. It was too large to include in the briefing.

HISTORY OF COMMUNICATION: Gov. Haley spoke to Mr. Timmons on the phone on Wed., Feb. 24th. She has also met Tim Keating of Boeing on multiple occasions.

SOUTH CAROLINA MANUFACTURING OVERVIEW:

- South Carolina's total manufacturing output in 2014 was valued at more than \$31 billion, accounting for 16.8% of the state's gross domestic product.
- The state generated \$30.9 billion in exports in 2015, up 4% from 2014 (\$29.7 billion). Although 2015 figures on manufacturing exports are not yet available, the sector has historically contributed 97% of all South Carolina exports.
- From 2009 to 2014, the South Carolina manufacturing sector grew 23.0%; its compound annual growth rate for the five year period was 4.20%.
- Manufacturing accounted for 11.9% of all non-farm employment in the state in 2014. The average annual number of employees in the sector was more than 230,000.
- The average annual wage in 2014 among all occupations in the state's manufacturing sector was \$44,990.
- For 2011 (latest figures available), the state had 21,500 establishments engaged in manufacturing.
- South Carolina's manufacturing output accounted for 1.5% of the U.S. manufacturing GDP, placing it in the top half (24th) among all states.

SUGGESTED TALKING POINTS:

- I would like to start by thanking Jay Timmons and the National Association of Manufacturers for having me today.

- I truly believe that manufacturing is a vital part of our economy, not just in South Carolina, but nationwide.
- Five years ago, when I became Governor, I sat down with our Secretary of Commerce, Bobby Hitt, and we developed a strategy.
- We agreed that South Carolina's industry recruitment efforts would not focus on poaching businesses from our neighboring states.
- Instead, we wanted to bring companies into the U.S. and into South Carolina from all corners of the globe.
- It's been our mission to create jobs and opportunities for Americans and for the people of our state. And, that's what we've done.
- In three of the last four years, South Carolina has ranked first in attracting jobs through foreign investment, per capita, according to an analysis by IBM-Plant Location International.
- Since 2011, we've successfully recruited world-class manufacturers, such as tiremakers Bridgestone, Continental and Giti; automakers and suppliers BMW, Mercedes-Benz Vans, Volvo Cars and ZF Group; and, of course, aerospace giant Boeing.
- Over the last six years, our manufacturing employment has increased 13.1%, a figure which leads the Southeast.
- And, in 2015, 56 percent (9,680) of the new jobs recruited to our state were in the manufacturing sector.
- Thanks to this booming manufacturing industry, our state leads the nation in both the production and export of tires, as well as the export of completed passenger motor vehicles.
- As we look to build on the success we've had in manufacturing, the challenge we face is the continued development of our workforce.
- In South Carolina, we are making high-tech, complex products. This requires a highly-skilled, advanced workforce.
- Our state technical college system and its robust workforce training programs have been critical to our transformation into a leader in advanced manufacturing.
- As everyone in this room knows, the manufacturing jobs of 2016 are nothing like the manufacturing jobs of 1950.
- The manufacturing jobs of today are clean, safe and well-paying. They are also incredibly rewarding.
- The National Association of Manufacturers does a great job, but we all need to continue to spread this message.
- Making things is cool, and in South Carolina we make cool things.
- Our manufacturing workers have a tremendous amount of pride
- In South Carolina, we know that our loyal workforce has gained a global reputation for making things and making them well.
- Manufacturing isn't just a job or a paycheck for the people in my state, it's part of who we are.

- From premium automobiles to wide-body commercial aircraft, we are extremely proud of the products we manufacture in South Carolina.
- And, each time one of those products rolls off an assembly line in our state, we take great satisfaction in knowing that it will properly represent, not only the “Made in South Carolina” brand, but also the “Made in America” brand.